



Report to the Commissioners
Area IX Agency on Aging, Flathead County
January 22, 2019
Prepared by Lisa Sheppard, Director

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2017 actuals
FY 2018 annual targets
FY 2018 actuals
FY 2018 actuals as a percentage of annual targets
FY 2018 actuals as a percentage of FY 2017 actuals
FY 2019 actuals to date
FY 2019 annual targets
FY 2019 actuals as a percentage of FY 2019 annual targets

The general target is 50% for FY 2019, July 1, 2018-December 31, 2018, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

Data to note:

- Since I did not give a report in December, most numbers in the “Total Last Report” column are highlighted in yellow as they now include data from November 2018.
- **The # of unduplicated clients receiving Independent Living Services** is almost at target for the year as all clients were counted as “new” in July. However, we anticipate serving more individuals this year than originally estimated due to federal fiscal year 2018 funding increases and an increased turnover in clients as we’ve moved to a sliding fee scale system.
- **Outreach/Education** efforts continue above target for the year due to BEC grant related outreach.
- **Meals/Nutrition** - Total meals served are just under target for the fiscal year and just under the pace of last year.
- **Transportation**
 - Total rides are 12% above target for the year due to increases in non-GNP fixed route ridership and seasonal rides within Glacier National Park, despite early closures due to fires.
 - Excluding rides within GNP, we’ve provided 1,058 more rides than this time last year.
 - Rides on our after school program route have increased this year as ridership to the SPARKS program has grown substantially and we’ve added the Kalispell Parks-n-Rec program to the route on a trial basis. Last year at this time we provided 3,450 rides; this year we are at 9,056

rides, an increase of 5,606 rides. We are currently evaluating whether we can continue these routes due to capacity limitations.

- Rides on the previously underperforming Kalispell fixed route continue to grow on both the AM and PM runs. We are up 1,235 rides on these routes from this time last year. This month, we added a new “Orange Line” in the city which will further increase the number of rides on fixed routes.
- Our Dial-A-Ride (DAR) service, which now includes paratransit rides in Kalispell plus premium DAR rides in Evergreen and west of Kalispell, continues to provide fewer rides than last year (down about 8%) when all DAR rides were paratransit rides related to the Kalispell/Evergreen fixed route. However, we extended the hours of available service for the premium DAR service at the end of December which should result in an increase in rides in the coming months.

▪ **Independent Living Services**

- The “unit of service” numbers are for November, when the target was 41.66%. We are on track for homemaker, above target for personal care and below target for the other services. Staff continue to re-assess all IL clients and update service plans and are beginning to assess those on the waiting list now that we have clear budget numbers from DPHHS.

▪ **Benefits Counseling**

- We’ve exceeded our target for the year due to our Benefits Enrollment Center grant outreach efforts, a greater than expected number of individuals requesting assistance during Medicare Open Enrollment and the addition of several extra Medicare 101 classes.

▪ **Ombudsman**

- Although ombudsman cases are outpacing our target at this time, we expect to see a decrease in cases in the next few months due to staff leave.

AOA Administration

Budget and Contracts

- We will submit a budget amendment at the end of January to reflect federal funding increases and corresponding expenditure adjustments.
- Staff are working on the FY 2020 CIP and budget drafts.
- DPHHS has now provided us with an annualized budget for FY 2019 which will allow us to make informed staffing and program decisions for the remainder of the fiscal year and moving forward into FY 2020.
 - Staff submit financial reports monthly to DPHHS.
- We received a new Benefits Enrollment Center (BEC) grant for \$35,000 from the National Council on Aging (NCOA), effective January 1- December 31, 2019. This grant supports us to assist Medicare beneficiaries to apply for other public benefits for which they may be eligible. We are again partnering with the Western Montana Area VI Agency on Aging to implement the grant. The Memorandum of Agreement with Area VI is on your agenda for signature today.
- Contracts for independent living service providers are in progress. Tara has reviewed them and they are out for provider review.

Building

- The lobby ceiling has been repaired, retextured and repainted. Expansion joints were added to decrease the likelihood of future cracking.

HR/Staff Development

- We filled the open Cook (1.0 FTE) position.
- We will take over the Veteran Directed Home and Community-Based Services program from Area VI (tentatively May 1st) and will need to hire a Service Coordinator for the program. See I&R/Assistance section of the report below.
- Now that we have confirmation of our annual budget from DPHHS, we are analyzing staffing needs in our I&A/Outreach/Benefits Counseling programs to determine how best to meet the increased demand for assistance.

State/Federal/Legislative Issues

- The federal government shutdown is not affecting aging services at this time. It continues to appear the FY 2019 federal budget will maintain the increases for aging services achieved in FY 2018, including nutrition, IIB supportive services, caregiver support, preventive health and SHIP.
- Area Plan on Aging
 - The draft of the new 4-Year Area Plan on Aging is due to DPHHS March 15, 2019.
 - We will present it to the AOA Advisory Council at the March 14th meeting for review and vote. The Plan requires the AOA Council Chair's signature as well as Commissioner approval. I will schedule time on your agenda to present the Plan.
 - A cornerstone of the Plan is incorporating older adult and general public input.
 - A public meeting is scheduled this afternoon at the South Campus from 1:00-3:00 pm in the second floor conference room.
 - We've conducted two focus groups, one with the AOA Advisory Council in November and one with the Age-Friendly Flathead Steering Committee in October.
 - We held a public meeting on December 13th as part of the annual Transportation Coordination Plan process. This feedback will also be incorporated into the Area Plan.
 - We have a public survey out right now that is available in our offices, all area senior centers, and other locations frequented by older adults. They are due back to us by February 8th.
 - We have also distributed surveys to AOA and Eagle staff and solicited staff feedback through internal focus groups.
 - The federal Administration for Community Living requires the plan focus on the following four areas:
 1. Older Americans Act Core Programs
 2. Specific Programs: ADRCs, Evidenced-based Disease Programs and SHIP/SMP
 3. Participant-Directed/Person-Centered Planning
 4. Elder Justice (Ombudsman, Legal Services, Adult Protective Services)
- Montana Area Agencies on Aging Association (M4A)
 - M4A advocates for aging services funding and policies that support older Montanans. Priorities for this state legislative session include restoration of the 2.5% state general fund cut to Area Agencies on Aging in the last session, restoration of our provider rate increase and new provider rate increases as necessary, restoration of funding for other supportive services that older adults depend on like the Office of Public Assistance, adequate funding of Home and Community-Based Medicaid Waiver slots to reduce waiting lists and exploration of options for long-term funding stability for aging services given the rapid rise in the aging population.

- Lisa continues to participate on a subcommittee to advise the state on redesigning the Legal Services Developer program that provides federally mandated legal advice and services to older adults.

AOA Advisory Council

- The Advisory Council met on January 10th and learned about My Glacier Village, a new nonprofit based on the national Village-to-Village model.
- The next meeting will be March 14th to review and vote on the new Area Plan on Aging.

Outreach/Education/Media

Note: Transportation related outreach is noted in the Eagle Transit section below.

November

- 11/1/18, BEC outreach event at Columbia Falls United Methodist Church, 12
- 11/5/18, monthly interview on KGEZ, 15,000
- 11/8/18, presentation to aging class at FVCC, 14
- 11/9/18, BEC outreach event at Gateway Community Center, 20
- 11/10/18, participated in/provided BEC outreach at the Veterans Summit at the Red Lion, 75
- 11/15/18, participated in annual CDBG community needs meeting, 20
- 11/16/18, presentation on AOA services to library staff, 30
- 11/18/18, interview on KLOVE radio, 17,000
- Multi-media promotion of 11/20/18 Medicare 101 class
- 11/20/18, Medicare 101 class, 15
- Multi-media promotion of 11/27/18 Medicare 101 class
- 11/27/18, Medicare 101 class, 10
- 11/30/18, outreach with CAP for LIEAP program at AOA, 65

December

- 12/3/18, monthly interview on KGEZ, 15,000
- 12/6/18, presentation to Columbia Falls Lion's Club, 12
- 12/18/18, distribution of Benefits Check-up/LIEAP info to Meals on Wheels clients, 300
- 12/23/18, interview on KLOVE radio, 17,000
- Multi-media promotion of Medicare 101 class
- BEC outreach ads:
 - Daily Inter Lake print and web (12/26/18 and 12/27-31/18)
 - Hungry Horse News (12/26/18)
 - Whitefish Pilot (12/26/18)
 - Shopper (12/26/18)

Age-Friendly Flathead

- The Committee did not meet in November or December. The next meeting will be in March or April, date TBD.

Eagle Transit

- Montana Department of Transportation (MDT):
 - We received notice of an adjustment in our FY 2019 state TransADE funding from \$75,556 to \$89,246, an increase of \$13,690. TransADE is revenue from rental car fees that supports transportation for older adults and people with disabilities.
 - Annual Transportation Coordination Plan (TCP), 5311 Application and Capital Request

- We received notification of our funding allocation for FY 2020 at the end of December:
 - \$721,400 in 5311 federal transit funds (up \$15,592 from \$705,808 this year)
 - \$142,596 in state TransADE funds (up \$67,040 from \$75,556 originally allocated for FY 2019)
 - Total increase of \$82,632
 - The annual “destination survey” and onboard survey were conducted in November/December and results have been tabulated.
 - TAC members provided their input to the Plan at the January 3rd meeting.
 - Staff have updated private transportation provider information.
 - A draft of the TCP, budget and capital request is in progress.
 - A letter from Commissioners authorizing me to submit the TCP/5311 Application and Capital Request through the MDT webgrants system is on your agenda for signature today.
- 5-Year Transportation Development Planning Grant
 - We received an extension of the grant through December 31, 2019. The amendment is on your agenda for signature today.
 - The Planning Committee will meet in February.
 - Transportation Manager Tom Schneider has been meeting with Whitefish City planning staff about partnership options for seasonal service.
- Second quarter financial, program and vehicle reports are due at the end of January.
- Outreach/Education/Media/Special Events:
 - The annual TCP public input meeting was held on December 13th.
 - The KPAX commercial ran in November and December on the CW and on Channel 8 KAJ (CBS morning show, The Price is Right and Jeopardy/Wheel of Fortune. However, we discontinued the commercial at the end of December as we re-evaluate our marketing strategy.
 - As required by federal regulations, a monthly ad ran in the Daily Inter Lake in November and December.
 - Multi-media promotion in November and December of TCP Public Meeting and January TAC meeting.
 - Tom presented with a TAC member to the Columbia Falls City Council on 12/7/18.
 - Ads ran in the Daily Inter Lake on 12/17 and 12/23 regarding the discontinuation of the Evergreen Commuter.
- Operations:
 - Evergreen
 - We discontinued the Evergreen Commuter due to lack of ridership.
 - We expanded the hours of service for Premium Dial-A-Ride to provide eligible passengers more service options.
 - Developing a workable solution for Evergreen is a priority for our TDP.
 - We are looking into volunteer driver models that are common in many rural areas around the country that might be suitable for Evergreen as well as other rural areas of Flathead County that we can’t serve with our existing system.
 - Orange Line
 - We created a new fixed route in Kalispell called the Orange Line (the existing route is now called the Green Line) that began operating December 31st. The Orange Line

expands stops in the downtown Kalispell area, covers multiple apartment complexes, reduces travel time to Hutton Ranch and offers new stops directly in front of some Hutton Ranch businesses.

- “February Free”
 - We’re offering free rides in February on all our fixed and commuter routes to encourage people to ride the bus generally and to try the new Orange Line.
- We are about to receive two new 13-passenger buses approved for in FY 2019. Contracts are on your agenda today for signature.
- Transportation Advisory Committee (TAC)
 - The next TAC meeting will be February 7th from 2:00-4:00 pm. Members will review and vote on the annual Transportation Coordination Plan. *Note:* This is a new standing meeting date/time.
- Glacier National Park
 - The annual CA modification and new budget will be available for Commissioner review and approval after the government shutdown ends.
 - We are currently holding billing to the Park.

Nutrition

- All annual nutrition congregate site assessments have been completed.
- The annual Christmas meal was served on Thursday, December 16th. There were 167 diners at AOA. A total of 550 meals were served countywide.
- We are serving around 80 diners daily on average in the AOA dining room for winter.
- We distribute nutritional education materials monthly to all home-delivered clients and all senior centers.
- We passed our January health inspection with an A+.

I & R/Assistance/Ombudsman/Independent Living Services

- Volunteer Program
 - We continue to update our volunteer program policies and procedures and recruit new volunteers to assist with reception and I&A duties in the office.
- Veteran Directed HCBS Program
 - Approximately 25 Flathead County veterans are enrolled in the program at this time. This census has held steady over the last few months with continued growth expected.
 - Area VI is ready to transition implementation of the program for Flathead County veterans to us. We are in the process of completing the necessary steps and have set a tentative date of May 1st to complete the transition.
 - We will have to hire and train a Service Coordinator for the program prior to May 1st. We are working on a job description and FTE request.
 - Monthly fees paid to us by the VA will cover the cost of staff and program overhead.
- Independent Living Services:
 - We continue to have a waiting list for new clients while we are reassessing existing clients, but we’re looking to move some people from the waiting list onto services shortly.
 - We are continuing to offer services on a donation basis to those clients whom we have not yet visited for a re-assessment and Benefits CheckUp.
 - IT completed modifications to our database to allow for automated sliding fee scale billing.

- Benefits Enrollment Center grant
 - We received another one-year grant for \$35,000 (January 1-December 31, 2019), again partnering with the Area VI Agency on Aging.
 - We continue to work with IT to launch a new AOA website.

Senior Mobile Home Repair

- The Advisory Board met on December 12th and January 9th. The next meeting will be 2/13/19 at 10:00 am at the Flathead Builders Association board room.
- Nine projects were completed since the last report; 9 are in progress; 16 are on the waiting list.
- Donations pledged/received since the last report: Washington Foundation (\$10,000), BNSF (\$2,500), Whitefish Soroptimists (\$2,000)

Senior Centers - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- We are in the process of getting all of the annual contracts approved and signed by the senior center boards.
- Staff continue to communicate with the Bigfork Community Center Board about building options.
- Status of repair requests:
 - The Whitefish Community Center has been significantly damaged by soil settling related to construction of a new building next door. It is unclear when repairs will start.
 - Whitney continues to work with the North Valley Senior Center on their request for railing along the front porch and ramp and repairs to porch itself. The Center hopes to replace the porch with concrete instead of wood and so will wait until spring to start the project if approved.

January 2019 Report: Performance Measures Tables - December 2018 stats (FY 2019)

50.00%

MEASURE	FY 2017 Actuals	FY 2018 Target	FY 2018 Actuals	FY 2018 % of Target	FY 2018 as % FY 2017	Dec	Total Last Report	Total/Avg. to Date	FY 2019 Target	% Target
# Receiving Independent Living Services	178	233	110	47%	62%	not yet available	95	95	98	97%
# Receiving Meals on Wheels	470	465	374	80%	80%	4	276	280	465	60%
# Seniors Receiving Congregate Meals	1,785	1,000	1,404	140%	79%	55	1,043	1,098	1,200	92%
# Eagle Transit DAR Unduplicated Riders	401	500	331	66%	83%	24	250	274	450	61%
% of Service Recipients at Moderate to High Risk of Institutionalization	89%	88%	92%	105%	103%	90%	89%	90%	88%	102%
Per Meal Cost of Nutrition Services	\$6.89	\$6.75	\$6.29	93%	91%	\$6.32	\$5.76	\$6.32	\$7.00	90%
% Overall Satisfaction with AOA Services from Annual Survey	N = 99%, IL = 96%	95%	N=97% IL=90%			N/A	N/A		95%	
Maximum annual number of transportation complaints	30	36	12	33%	40%	0	0	0	36	0%
WORKLOAD INDICATOR	FY 2017 Actuals	FY 2018 Target	FY 2018 Actuals	FY 2018 % of Target	FY 2018 as % FY 2017		Total Last Report	Total/Avg. to Date	FY 2019 Target	% Target
Outreach/Education/Media						Dec				
Public Outreach/Education/Media Efforts	123	120	116	97%	94%	9	60	69	120	58%
Nutrition						Dec				
Total Meals	82,428	79,000	80,639	102%	98%	6,383	32,458	38,841	80,000	49%
MOW	49,695		47,409	N/A	N/A	3,911	18,710	22,621		
Congregate	32,733		33,230	N/A	N/A	2,472	13,748	16,220		
Nutritional Assessments Conducted	2,424	1,550	1,846	119%	76%	97	1080	1,177	2,000	59%
Transportation						Dec				
Total Ride Count	85,305	90,000	99,104	110%	116%	7,964	47,464	55,428	90,000	62%
Dial-A-Ride Count	30,025	30,000	31,645	105%	105%	2,069	11,233	13,302	30,000	44%
City, Commuter and Other Ride Count	55,280	60,000	67,459	112%	122%	5,895	36,231	42,126	60,000	70%
Eagle Transit Outreach/Special Events	40	15	42	280%	105%	4	15	19	24	79%
Information and Referral/Assistance						Dec				
Info and Referral/Assistance Contacts	17,523	18,000	19,429	108%	111%	3,608	8,953	12,561	18,000	70%
Independent Living			93%			Nov				31%
Homemaker Units of Service	784	2,500	2,005	80%	256%	130	460	590	1,324	45%
Escorted Transportation Units of Service	792	1,739	2,314	133%	292%	71	312	383	1,391	28%
Respite Units of Service	992	2,468	2,079	84%	210%	170	767	937	3,250	29%
Community Support/Senior Companion Units of Service	1,060	1,353	1,310	97%	124%	39	260	299	1,176	25%
Personal Care Units of Service	358	435	231	53%	65%	23	33	56	65	86%
Benefits Counseling						Dec				
Benefits Counseling Hours of Service	600	450	502	112%	84%	95	562	657	450	146%
Ombudsman						Dec				
Ombudsman consults/cases opened	1034	1,100	1,250	114%	121%	86	557	643	1,100	58%